



**Update \_2\_0\_82**

**Clinical Reminders**

**VA-ADVANCE CARE PLANNING**

**Install Guide**

**July 2019**

Product Development  
Office of Information Technology  
Department of Veterans Affairs

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# Introduction

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## Description:

The two dialog templates, included in this update, are only to be used for Advance Care Planning (ACP) via Group Visits (GV) which reflects an ACP Group conducted by trained facilitators utilizing information from the Veteran's ACP Worksheet. Both documents are written in Clinical Reminder Dialog format to enable the extraction of health factors that will provide data for measurement of the impact of the ACP-GV process on the Veterans. This is a Diffusion of Excellence Program that was mandated by the Secretary of the VA. These dialog templates are mandatory for use by Advance Care Planning groups.

To date, no other CPRS templates reflect the information and data collected during the Advance Care Planning Group Discussion. It is necessary to effectively evaluate this national program and record individualized Veteran information for the continuity of care with the VA System.

Consistency in the documentation from one VA Facility to another, reducing the documentation time spent by clinicians and support staff, decreases the manual process of data collection and reporting data to the program office.

For more information, contact the Office of Social Work: Lisa M. Nabholz ([lisa.nabholz@va.gov](mailto:lisa.nabholz@va.gov)) and Jamie Jensen ([jamie.jensen2@va.gov](mailto:jamie.jensen2@va.gov)).

## Two reminder dialogs are being distributed with this update:

VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)

VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)

UPDATE\_2\_0\_82 contains 1 Reminder Exchange entry:

**UPDATE\_2\_0\_82 VA-ADVANCE CARE PLANNING**

## The exchange file contains the following components:

### TIU TEMPLATE FIELD

WP 1 LINE

PLAN:

IC/BLANK LINE 74 CHARACTERS T DIALOG USE

ACP GV DOCUMENT

WORD 2 LINES RQ

WORDFLD\_EDIT\_50REQ

CHECK ALL THAT APPLY3

ACP-GV INDIVID

BLANK (1) SPACE

REQUIRED ANSWER

BLANK (2)

ACP-GV INSTRUCTIONS WORKSHEET

ACP-GV INTRO

## HEALTH FACTORS

VA-REMINDER UPDATES  
VA-UPDATE\_2\_0\_82  
VA-SOCIAL WORK ACP  
VA-ACP GV F/U-NOT CONTIN  
VA-ACP GV F/U-CONTINUE  
VA-ACP GV F/U-NO GOALS  
VA-ACP GV F/U-UNABLE  
VA-ACP GV F/U-PART GOALS  
VA-ACP GV F/U CALL-COMPLETE GOALS  
VA-ACP GV F/U CALL DONE: CONTACTED VET  
VA-ACP GV F/U CALL DONE: UNABLE TO CONT  
VA-ACP GV F/U CALL DONE  
VA-ACP GV SUPPORT PERSON: FRIEND  
VA-ACP GV SUPPORT PERSON: TRUSTED OTHER  
VA-ACP GV SUPPORT PERSON: GRANDCHILD  
VA-ACP GV SUPPORT PERSON: GRANDPARENT  
VA-ACP GV SUPPORT PERSON: SIBLING  
VA-ACP GV SUPPORT PERSON: PARENT  
VA-ACP GV SUPPORT PERSON: ADULT CHILD  
VA-ACP GV SUPPORT PERSON: SPOUSE  
VA-ACP GV SUPPORT PERSON: NONE  
VA-ACP GV ATTEND INDIVIDUAL  
VA-ACP GV ATTEND CREATED BY STAFF  
VA-ACP GV ATTEND ESTABLISHED GROUP  
VA-ACP GV ATTEND VA-VIRTUAL MED CENTER  
VA-ACP GV ATTEND TELEHEALTH  
VA-ACP GV ATTEND IN PERSON  
VA-ACP GV POST Q11-NOT ANSWERED  
VA-ACP GV POST Q11-DEFINITELY WILL  
VA-ACP GV POST Q11-PROBABLY WILL  
VA-ACP GV POST Q11-NOT SURE  
VA-ACP GV POST Q11-PROBABLY WILL NOT  
VA-ACP GV POST Q11-DEFINITELY WILL NOT  
VA-ACP GV POST Q9-NOT ANSWERED  
VA-ACP GV POST Q9-OTHER  
VA-ACP GV POST Q9-NEED TIME TO THINK  
VA-ACP GV POST Q9-UPDATE ADV DIR  
VA-ACP GV POST Q9-LEARN  
VA-ACP GV POST Q9-UNCLEAR GOALS  
VA-ACP GV POST Q9-FILE COPY  
VA-ACP GV POST Q9-NON-FAMILY  
VA-ACP GV POST Q9-HEALTHCARE PROVIDER  
VA-ACP GV POST Q9-FAMILY TALK  
VA-ACP GV POST Q9-COMPLETE  
VA-ACP GV POST Q9-CHECK CURRENT ADV DIR

VA-ACP GV POST Q8-KNOWLEDGE/NOT ANSWERED  
VA-ACP GV POST Q8-KNOWLEDGE/EXTREMELY  
VA-ACP GV POST Q8-KNOWLEDGE/QUITE A BIT  
VA-ACP GV POST Q8-KNOWLEDGE/MODERATELY  
VA-ACP GV POST Q8-KNOWLEDGE/A LIT BIT  
VA-ACP GV POST Q8-KNOWLEDGE/NOT AT ALL  
VA-ACP GV PRE Q7-NOT ANSWERED  
VA-ACP GV PRE Q7-NO  
VA-ACP GV PRE Q7-YES  
VA-ACP GV PRE Q6-NOT ANSWERED  
VA-ACP GV PRE Q6-NO  
VA-ACP GV PRE Q6-YES  
VA-ACP GV PRE Q5-NOT ANSWERED  
VA-ACP GV PRE Q5-NO  
VA-ACP GV PRE Q5-YES  
VA-ACP GV PRE Q4-NOT ANSWERED  
VA-ACP GV PRE Q4-NO  
VA-ACP GV PRE Q4-YES  
VA-ACP GV PRE Q3-NOT ANSWERED  
VA-ACP GV PRE Q3-NO  
VA-ACP GV PRE Q3-YES  
VA-ACP GV PRE Q2-NOT ANSWERED  
VA-ACP GV PRE Q2-NO  
VA-ACP GV PRE Q2-YES  
VA-ACP GV PRE Q1-NOT ANSWERED  
VA-ACP GV PRE Q1-KNOWLEDGE/QUITE A BIT  
VA-ACP GV PRE Q1-KNOWLEDGE/EXTREMELY  
VA-ACP GV PRE Q1-KNOWLEDGE/MODERATELY  
VA-ACP GV PRE Q1-KNOWLEDGE/A LITTLE BIT  
VA-ACP GV PRE Q1-KNOWLEDGE/NOT AT ALL  
VA-ACP GV DONE

**REMINDER SPONSOR**

OFFICE OF SOCIAL WORK

**REMINDER TERM**

VA-REMINDER UPDATE\_2\_0\_82

**REMINDER DIALOG**

VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)

VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)

**HEALTH SUMMARY TYPE**

None

## HEALTH SUMMARY OBJECTS

None

## TIU DOCUMENT DEFINITION

None

## Install Details

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This update is being distributed as a web host file. The address for the host file is:

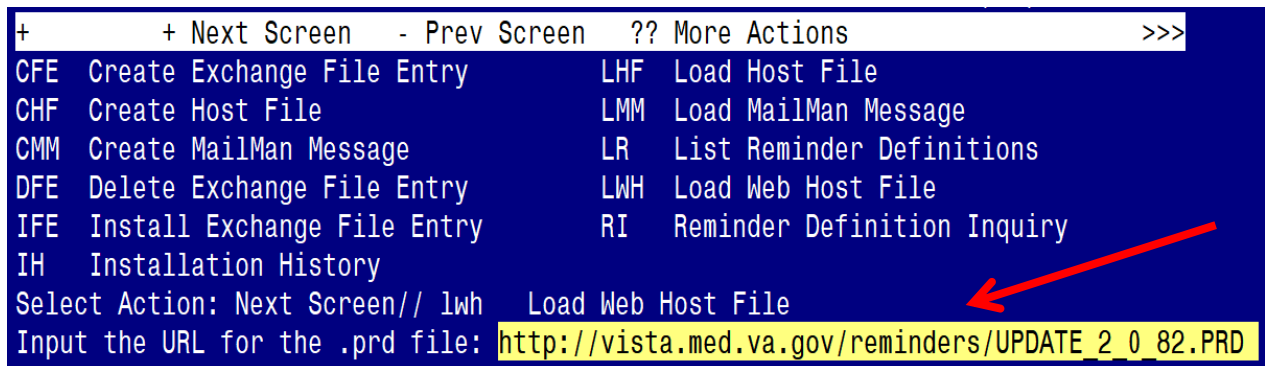
**[http://vista.med.va.gov/reminders/UPDATE\\_2\\_0\\_82.PRD](http://vista.med.va.gov/reminders/UPDATE_2_0_82.PRD)**

The file will be installed using Reminder Exchange, programmer access is not required.  
The total time for installation should be less than 15 minutes.

## Install Example

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To Load the Web Host File. Navigate to Reminder exchange in Vista



```
+      + Next Screen  - Prev Screen  ?? More Actions  >>>
CFE  Create Exchange File Entry      LHF  Load Host File
CHF  Create Host File                 LMM  Load MailMan Message
CMM  Create MailMan Message           LR   List Reminder Definitions
DFE  Delete Exchange File Entry       LWH  Load Web Host File
IFE  Install Exchange File Entry      RI   Reminder Definition Inquiry
IH   Installation History
Select Action: Next Screen// lwh      Load Web Host File
Input the URL for the .prd file: http://vista.med.va.gov/reminders/UPDATE_2_0_82.PRD
```

At the **Select Action:** prompt, enter **LWH** for Load Web Host File

At the **Input the url for the .prd file:** prompt, type the following web address:

**[http://vista.med.va.gov/reminders/UPDATE\\_2\\_0\\_82.PRD](http://vista.med.va.gov/reminders/UPDATE_2_0_82.PRD)**

**[http://vista.med.va.gov/reminders/UPDATE\\_2\\_0\\_82.PRD](http://vista.med.va.gov/reminders/UPDATE_2_0_82.PRD) successfully loaded.**

You should see a message at the top of your screen that the file successfully loaded.

Search and locate an entry titled **UPDATE\_2\_0\_82 VA-ADVANCE CARE PLANNING** in reminder exchange

+Item	Entry	Source	Date Packed
143	UPDATE_2_0_82 VA-ADVANCE CARE PLANNING	PLOTT@SALT LAKE CI	06/18/2019@09:53
144	UPDATE_2_0_84 VA-IRAQ POST DEPLOYMENT UPDATE	GRIFFITH@SALT LAKE CI	05/02/2019@09:50
145	UPDATE_2_0_86 VA-PC3 VETERAN CARE AGREEMENT	GRIFFITH@SALT LAKE CI	05/31/2019@11:36
146	UPDATE_2_0_9 VA-COLORECTAL CANCER SCREENING	GRIFFITH@SALT LAKE CI	03/20/2018@08:45
147	UPDATE_2_0_9 VA-COLORECTAL CANCER SCREENING REPORTS	GRIFFITH@SALT LAKE CI	07/21/2017@05:42
+    + Next Screen   - Prev Screen   ?? More Actions   >>>			
CFE	Create Exchange File Entry	LHF	Load Host File
CHF	Create Host File	LMM	Load MailMan Message
CMM	Create MailMan Message	LR	List Reminder Definitions
DFE	Delete Exchange File Entry	LWH	Load Web Host File
IFE	Install Exchange File Entry	RI	Reminder Definition Inquiry
IH	Installation History		
Select Action: Next Screen// 143			

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry  
Enter the number that corresponds with your entry titled **UPDATE\_2\_0\_82 VA-ADVANCE CARE PLANNING** (*in this example it is entry 143 it will vary by site*)

Component	Category	Exists
Source: PLOTT,JOSEPH G at SALT LAKE CITY		
Date Packed: 06/18/2019@09:53:34		
Package Version: 2.0P35		
Description:		
The following Clinical Reminder items were selected for packing:		
REMINDER DIALOG		
VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)		
VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)		
REMINDER TERM		
VA-REMINDER UPDATE_2_0_82		
Keywords:		
Components:		
+    + Next Screen   - Prev Screen   ?? More Actions   >>>		
IA	Install all Components	IS    Install Selected Component
Select Action: Next Screen// <b>IA</b>		

At the **Select Action** prompt, type **IA** for Install all Components and hit enter.  
Select Action: Next Screen// **IA Install all Components**

You will see several prompts, for all new entries you will choose **I to Install**. For any existing components, choose **S to Skip**

### DIALOG #1:

You will be prompted to install the **VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)** reminder dialog component:

Packed reminder dialog: **VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)** [NATIONAL

Item	Seq.	Dialog Findings	Type	Exists
1		VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)	dialog	
2	5	VA-SOC WORK ACP TELE NOTE VERSION Finding: *NONE*	element	
3	10	VA-GP SOC WORK ADVANCE CARE PLANNING (ACP) GROUP VISIT (GV) F/U Finding: VA-ACP GV F/U CALL DONE (HEALTH FACTOR)	group	X
4	10.5	VA-SOC WORK ACP GV F/U CONTACTED VETERAN: N/Y Finding: *NONE*	group	
5	10.5.5	VA-SOC ACP GV F/U CONTACTED VETERAN: NO Finding: VA-ACP GV F/U CALL DONE: UNABLE TO CONT (HEALTH FACTOR)	element	X
6		PXRM COMMENT	prompt	X
7	10.5.10	VA-SOC WORK ACP GV F/U CONTACTED VETERAN:	group	
+ Next Screen - Prev Screen ?? More Actions				
DD	Dialog Details	DT	Dialog Text	IS Install Selected
DF	Dialog Findings	DU	Dialog Usage	QU Quit
DS	Dialog Summary	IA	Install All	
Select Action: Next Screen// IA				

At the **Select Action** prompt, type **IA** to install the dialog – **VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)** Select Action: Next Screen// **IA Install All**  
Install reminder dialog and all components with no further changes: Y// **Yes**

Packed reminder dialog: VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD) [NATIONAL  
VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD) (reminder dialog) installed from

Item	Seq.	Dialog Findings	Type	Exists
1		VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)	dialog	X
2	5	VA-SOC WORK ACP TELE NOTE VERSION Finding: *NONE*	element	X
3	10	VA-GP SOC WORK ADVANCE CARE PLANNING (ACP) GROUP VISIT (GV) F/U Finding: VA-ACP GV F/U CALL DONE (HEALTH FACTOR)	group	X
4	10.5	VA-SOC WORK ACP GV F/U CONTACTED VETERAN: N/Y Finding: *NONE*	group	X
5	10.5.5	VA-SOC ACP GV F/U CONTACTED VETERAN: NO Finding: VA-ACP GV F/U CALL DONE: UNABLE TO CONT (HEALTH FACTOR)	element	X
6		PXRM COMMENT	prompt	X
7	10.5.10	VA-SOC WORK ACP GV F/U CONTACTED VETERAN:	group	X
+ Next Screen - Prev Screen ?? More Actions				
DD	Dialog Details	DT	Dialog Text	IS Install Selected
DF	Dialog Findings	DU	Dialog Usage	QU Quit
DS	Dialog Summary	IA	Install All	
Select Action: Next Screen// Q				

When the dialog has completed installation, you will then be returned to this screen. At the **Select Action** prompt, type **Q**.



## DIALOG #2:

You will then be prompted to install the **VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)** reminder dialog component:

Packed reminder dialog: **VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)** [NAT

Item	Seq.	Dialog Findings	Type	Exists
1		VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)	dialog	
2	5	VA-SOC WORK ACP GV NOTE VERSION Finding: *NONE*	element	
3	10	VA-GP SOC WORK ADVANCE CARE PLANNING (ACP) GROUP VISIT (GV) Finding: VA-ACP GV DONE (HEALTH FACTOR)	group	X
4	10.5	BLANK LINE Finding: *NONE*	group	X
5	10.10	VA-GP SOC WORK ACP GV VISIT TYPE Finding: *NONE*	group	
6	10.10.5	VA-SOC WORK ACP GV ATTEND IN PERSON Finding: VA-ACP GV ATTEND IN PERSON (HEALTH FACTOR)	element	X
7	10.10.10	VA-SOC WORK ACP GV ATTEND TELEHEALTH	element	

+    + Next Screen    - Prev Screen    ?? More Actions

DD   Dialog Details    DT   Dialog Text    IS   Install Selected  
DF   Dialog Findings    DU   Dialog Usage    QU   Quit  
DS   Dialog Summary    IA   Install All

Select Action: Next Screen// IA

At the **Select Action** prompt, type **IA** to install the dialog – **VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)** Select Action: Next Screen// **IA Install All**  
Install reminder dialog and all components with no further changes: Y// **Yes**

Packed reminder dialog: VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD) [NAT  
VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD) (reminder dialog) installed

Item	Seq.	Dialog Findings	Type	Exists
1		VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)	dialog	X
2	5	VA-SOC WORK ACP GV NOTE VERSION Finding: *NONE*	element	X
3	10	VA-GP SOC WORK ADVANCE CARE PLANNING (ACP) GROUP VISIT (GV) Finding: VA-ACP GV DONE (HEALTH FACTOR)	group	X
4	10.5	BLANK LINE Finding: *NONE*	group	X
5	10.10	VA-GP SOC WORK ACP GV VISIT TYPE Finding: *NONE*	group	X
6	10.10.5	VA-SOC WORK ACP GV ATTEND IN PERSON Finding: VA-ACP GV ATTEND IN PERSON (HEALTH FACTOR)	element	X
7	10.10.10	VA-SOC WORK ACP GV ATTEND TELEHEALTH	element	X

+    + Next Screen    - Prev Screen    ?? More Actions

DD   Dialog Details    DT   Dialog Text    IS   Install Selected  
DF   Dialog Findings    DU   Dialog Usage    QU   Quit  
DS   Dialog Summary    IA   Install All

Select Action: Next Screen// Q

When the dialog has completed installation, you will then be returned to this screen. At the **Select Action** prompt, type **Q**.

Component	Category	Exists
Source: PLOTT,JOSEPH G at SALT LAKE CITY		
Date Packed: 06/18/2019@09:53:34		
Package Version: 2.0P35		
Description:		
The following Clinical Reminder items were selected for packing:		
REMINDER DIALOG		
VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)		
VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)		
REMINDER TERM		
VA-REMINDER UPDATE_2_0_82		
Keywords:		
Components:		
+ + Next Screen - Prev Screen ?? More Actions >>>		
IA	Install all Components	IS Install Selected Component
Select Action: Next Screen// Q		

You will then be returned to this screen. At the **Select Action** prompt, type **Q**.  
Install complete

## Post Installation

### 1. Make the Dialogs able to be attached to a Personal/Shared template or to a progress note title.

From the Reminders Manager Menu:

Select Reminder Managers Menu Option: **CP CPRS Reminder Configuration**

CA Add/Edit Reminder Categories

CL CPRS Lookup Categories

CS CPRS Cover Sheet Reminder List

MH Mental Health Dialogs Active

PN Progress Note Headers

RA Reminder GUI Resolution Active

**TIU TIU Template Reminder Dialog Parameter**

DL Default Outside Location

PT Position Reminder Text at Cursor

Select CPRS Reminder Configuration Option: **TIU TIU Template Reminder Dialog Parameter**

Reminder Dialogs allowed as Templates may be set for the following:

1 User USR [choose from NEW PERSON]

3 Service SRV [choose from SERVICE/SECTION]

4 Division DIV [choose from INSTITUTION]

5 System SYS [NATREM.FO-SLC.MED.VA.GOV]

Enter selection: **5** Choose the appropriate number for your site. Your site may do this by System or other levels. The example below uses SYSTEM level

Setting Reminder Dialogs allowed as Templates for System:

Select Display Sequence: **?**

148 VA-VETERANS CHOICE NOTE

149 VA-TBI SCREENING

*When you type a question mark above, you will see the list of #'s (with dialogs) that are already taken. Choose a number **NOT** on this list. For this example, looking above I see the number 150 is not present, so I will use 150.*

Select Display Sequence: **150**

Are you adding 150 as a new Display Sequence? Yes// **Y YES**

Display Sequence: 150// **<Enter>** 150

Clinical Reminder Dialog: **type in the name of the dialog**

**VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)** then **<enter>** reminder dialog NATIONAL

OK? Yes// **<Enter>** (Yes)

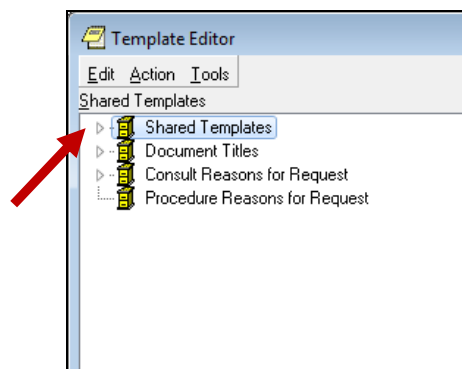
**NOTE:** REPEAT THESE SAME STEPS to create a sequence for:

**VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)** then **<enter>** reminder dialog NATIONAL

OK? Yes// **<Enter>** (Yes)

## 2. Add the dialogs to Shared Templates in CPRS.

Open the Template Editor and from Shared Templates, select "Shared Templates"

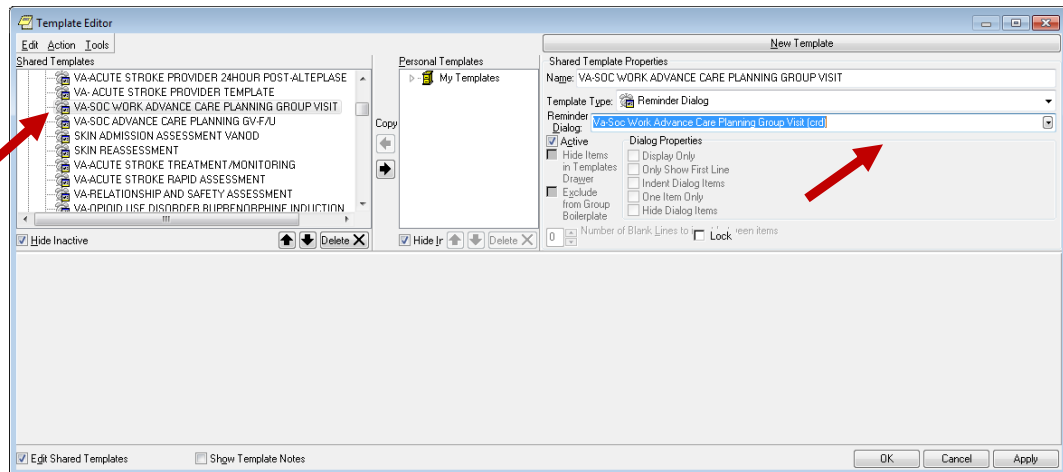


Click the 'triangle' to left of Shared Templated to expand. Select the folder(s) where the templates will be located.

**Suggestion:** Multiple disciplines/services may be accessing these templates. It is suggested to add these templates to a single folder for Advance Care Planning or to multiple service folders (i.e. Nursing, Social Work, Primary Care, Chaplain, Palliative Care, and/or Mental Health).

Click the New Template button

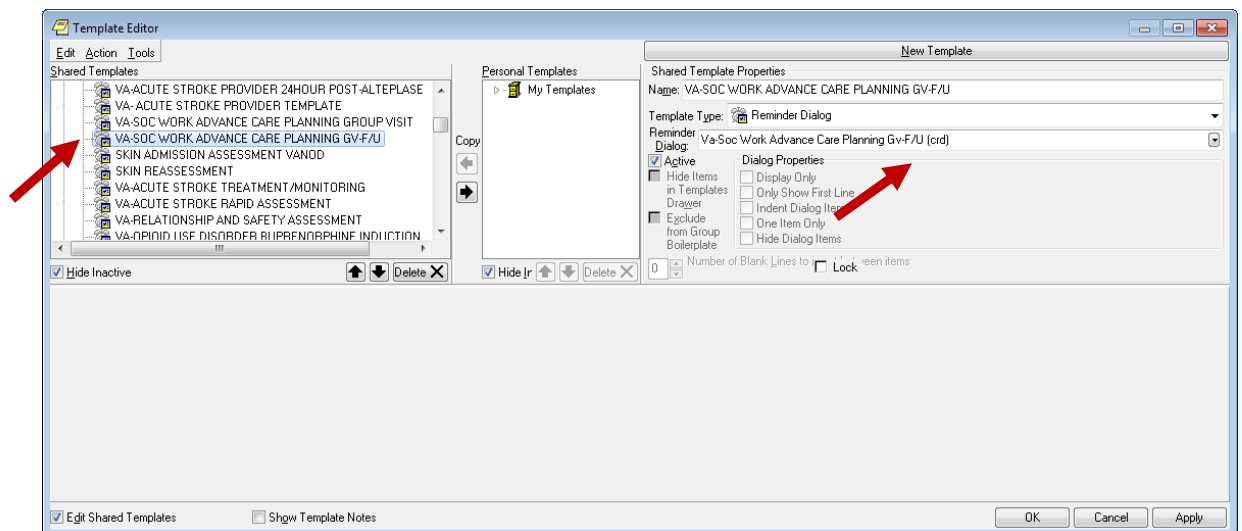
- Type VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT in the Name box
- Click the down arrow and Click on Reminder Dialog in the Template Type Box
- Type VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD) in the Reminder Dialog box
- Click Apply in lower right corner



Repeat these steps to add the 2<sup>nd</sup> template:

Click the New Template button

- Type VA-SOC WORK ADVANCE CARE PLANNING GV-F/U in the Name box
- Click the down arrow and Click on Reminder Dialog in the Template Type Box
- Type VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD) in the Reminder Dialog box
- Click Apply in lower right corner



Test the shared templates in CPRS to confirm the template is attached.

### 3. Notify your Advance Care planning POC to request the creation of a Clinic build.

Contact your local POC for Advance Care planning and provide the link and directions below:

- A new clinic/s in needed per the instructions on the VA Pulse Page
- The VA Pulse link to the Clinic Build instructions is > [ACP-GV Pulse](#)
  - o Refer to the Getting Started Folder / Building your clinic

*NOTE: If you require further technical assistance, if there are any questions or problems during the installation, please notify your local IT support to log a national help desk ticket or contact the VA Service Desk and have them submit a national ticket to:*

*Category: Enterprise Applications*

*Subcategory: Applications*

*Enterprise Application: VistA - Clinical Reminders*